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PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/JUNE 1990

EXCLUSIVE CONSUMER SURVEY

Annual Study Confirms Kid-Pack Trend

Use Of Single Serve, Shelf Stable Rises

Efficient Line Lets Packager Compete

The Latest Trends In Drug Packaging

Basic Review Of Carded-Blister Machinery

Vote For 1990 Innovator Awards

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FINDINGS...

Over 20% of respondents indicate they planned to use more **single-serve** food containers in 1990 than they did in 1989.

More than 89% of those surveyed checked for a **code/expiration date** on a package before purchasing.

Over 19% experienced **off-flavors** or off-aromas, attributable to the packaging, in the past year.

More than 87% checked for **evidence of tampering** the last time they purchased a food or drug product.

Another 45% avoided such a purchase, because the package appeared to have been **tampered** with, in the last six months.

Almost 30% said **recyclability** "often" affected their purchasing decision.

More than 52% of those surveyed said that **steel is "difficult to recycle."**

Almost 18% of respondents said that **75% or more** of the trash they discarded was made up of packaging.

EXCLUSIVE
PACKAGING SURVEY

Consumers Determine Package Success

Kids zapping their own dinners. Ambivalence over plastic packaging. These are among the new consumer realities revealed in PACKAGING's exclusive annual survey

By Melissa Larson
Senior Editor

When the moment of truth arrives and a shopper is approaching your package, remember that consumers' "internal" trends are a powerful influence on the choices they make.

Demographically speaking, singles become couples when they marry. They'll be transformed into parents when their first child is born. As they age, yet more lifestyle shifts are inevitable. When it comes to the products they buy, their own changing needs are at least as important to them as environmental concerns or other external social trends.

As a packager, you're in a position to profit from these shifts in the delicate balance of shopping habits. Or, you can miss them and wonder what went wrong. When it comes to consumer trends, knowledge is power.

It's with that in mind that PACKAGING conducts its exclusive nationwide consumer survey each year. With the help of a leading consumer-opinion research firm, questionnaires were mailed to a demographically representative sample group. This year, 741 of the 1,000 questionnaires mailed were returned, making the margin of error plus-or-minus 4%.

Answers to the 45 questions were tabulated by age group, lifestage (see explanatory box), geographical region, education and income.

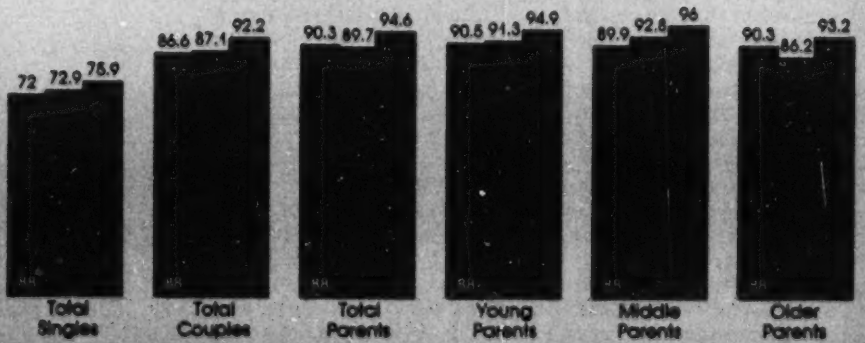
The results give a clear picture of consumers' current state of mind and reveal some emerging trends which may influence the packaging decisions you will make in the coming year. We've focused on four in particular.

Zapping kids

Kids are consumers. If you don't believe it, ask their parents. Mom or Dad may do the paying at checkout, but the kids help shop. They voice their preferences, and their

KIDS FUEL MICROWAVE SURGE

Do you use a microwave oven?



Microwave usage, which seemed to be leveling off last year, is up again. Biggest gains are among parents, perhaps due to several new zappable kids' meals.

Kids are cooking: microwave usage is up among parents this year

votes count.

More and more, they're voting for microwavable meals. Microwave usage is up this year, and a quick glance at the demographics shows that parents are in large part responsible. Usage has reached 94.9% among young parents, 96% among middle parents and 93.2% among older parents. These high levels represent increases of from 3% to 7% over last year.

In last year's survey, overall microwave usage appeared to have leveled off. To the question, "Do you use a microwave oven?" 84.6% of last year's respondents answered yes, compared with 83% in 1988. That appeared to indicate a plateau, following several years of strong growth.

However, overall microwave usage has reached more than 89% in this year's survey. Although the numbers are up in virtually all lifestage groups, it is among parents that the gains are the strongest.

So the introduction of several new microwavable meals for kids in the past year to 18 months does not appear to be a coincidence.

From the launch of My Own Meals in shelf-stable retort pouches to the recent introduction of Tyson's Looney Tunes frozen entrees, a parade of zappable meals for kids has created a whole new microwave segment.

In fact, it's a segment that some food marketers have estimated at between $250 and $500 million in potential annual sales.

It would be dangerous for a food company to pin its microwave marketing hopes entirely on kids: the boomlet is only a demographic ripple, after which their numbers will decline. It might be smarter to formulate zappable meals for seniors! But there are all sorts of reasons these children's products are working.

First, kids like them. With a less well-developed palate than an adult's, a kid's menu choices tend to be of the simple-and-mushy variety. Many of the objections adults have to the taste and texture of microwaved food simply don't apply.

Second, and more important, parents feel comfortable buying these meals for their children. Marketers have done an excellent job of telling parents that these items are nutritious and a good value.

Populated by the likes of Hormel (Kid's Kitchen) and Con-Agra (Kid's Cuisine), the zappable kids' meal arena may soon have more players. Gerber and J.R. Simplot are among companies rumored to be preparing new introductions.

The question now facing marketers of these items is, What zappable packages do kids like best—shelf-stable containers like cups and pouches, or frozen trays with handles? Safety considerations will undoubtedly enter, since a big part of the appeal of many of these new products is the child's ability to prepare the entree by himself.

Single-serve satisfies

Single-serving packages for such items as yogurt, soup, stews and pudding appear to have caught on among their targeted consumers.

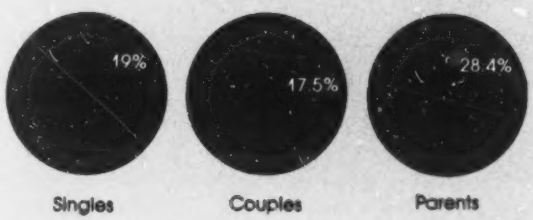
In fact, over 25% of single people we surveyed told us they used single-serve packages three or more times a week. Another 19% ate out of such containers once or twice a week, and slightly over 55% told us they used them less than once a week, or not at all.

Single-serves also proved popular among parents. Nearly 22% used them three or more times per week, and more than 28% relied on them one or two times weekly. Less than 50% answered with less than once per week or not at all.

Quick lunches at one's desk and school lunchbox fillers seem to be the favorite uses for these convenience packages. Also, marketers sus-

HEAVIEST USERS OF SINGLE-SERVE?...SINGLES

How many times a week do you use single-serve food containers?

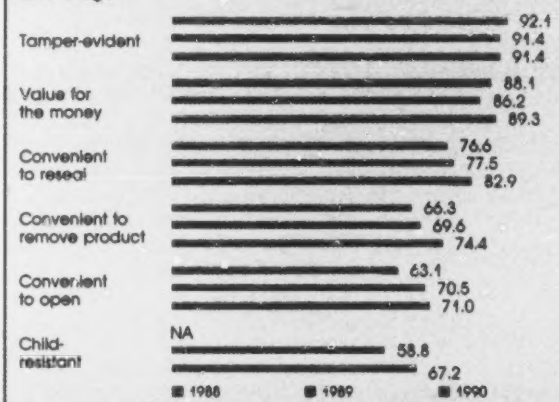


■ Light: less than once a week, or never
■ Medium: 1-2 times a week
■ Heavy: 3 or more times a week

Briefcases and lunch boxes—that's where single-serve packages are found. Our survey noted heaviest use by singles and parents—couples without kids avoid them.

PROTECTION AGAINST TAMPERING, POISONING DRIVE OTC SHOPPERS

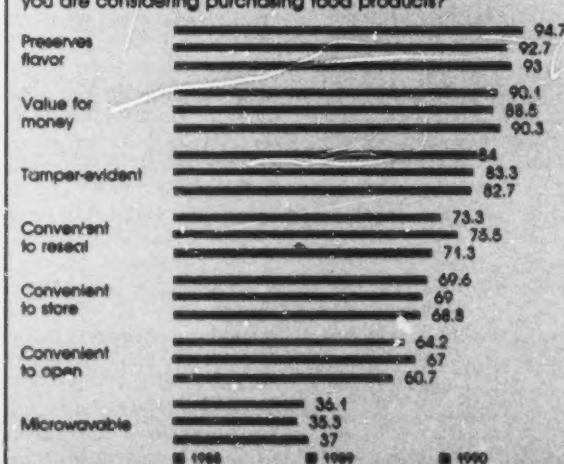
How important are each of the following characteristics when you are considering the purchase of OTC pharmaceuticals and drugs?



Tamper-evidence is still the No. 1 feature of OTC drug packages, our survey finds. Child-resistance seems far more important to shoppers than last year.

FOOD PACKAGES SHOULD FIRST PRESERVE FLAVOR, SAY CONSUMERS

How important are each of the following characteristics when you are considering purchasing food products?



Zappability and storing convenience are nice—but flavor is No. 1, say consumers. A full 93% of those polled rated it "extremely/very important."

Consumers feel ambivalent about the plastic packaging they buy

pect some single-serve packs may be prepared for general at-home grazing by both kids and adults.

However, single-serve packs aren't as popular among couples (two-member households with no children). Over 64% of such consumers told us they used single-serves less than once per week, or not at all.

Frozens stay frisky

In the balance of power among shelf-stable, frozen and refrigerated food products, frozens still retain a commanding lead.

Consumers were asked to name their preferred package, assuming that a particular prepared dinner or entree was available in all three forms. Almost 59% said they would prefer the frozen product. About 22% named shelf-stable as their favorite. The "nonfrozen/refrigerated" responses numbered just over 15%.

Slight shifts in these percentages from last year's survey are not statistically significant. It is clear, at least for now, that Americans have not forsaken their home freezer in favor of gourmet takeout.

Plastics: guilty pleasure?

Much has been reported about efforts made by the plastics industry to deal with the solid-waste issue, as well as ways of dealing with consumer perceptions. Many environmentalists and well-meaning but misinformed journalists have, in their Earth Day 1990 zeal, seized upon plastic packaging as a symbol of the solid-waste problem.

It's not that consumers haven't recognized the problem—our survey shows they have. It's just that the views they hold as voters and citizens have only barely begun to influence their packaging choices.

Plastic packaging is a general favorite, for many reasons. It's a heavy favorite for microwaving. Again this year, almost 43% of our respondents named plastic as their favorite microwave package, vs. the 28% who voted for paperboard, the 25% who voted for glass and the 1% who liked aluminum.

Plastic is still the preferred package for liquid soup, with just over 40% of our respondents naming it, vs. 33% choosing metal cans and 19% choosing glass. And it's still number one among milk drinkers, with over 44% of our respondents preferring it, vs. 34% preferring glass and 20% preferring paper.

So consumers are still buying plastic packaging. But they might not be doing so without hesitation. In spite of expensive public-relations campaigns by plastics suppliers, consumer perception of plastic's recyclability has not improved.

When asked, "In your opinion, how easy is it to recycle plastic?" almost 57% of those surveyed answered "difficult/very difficult." That's a gain of about 2% over last year.

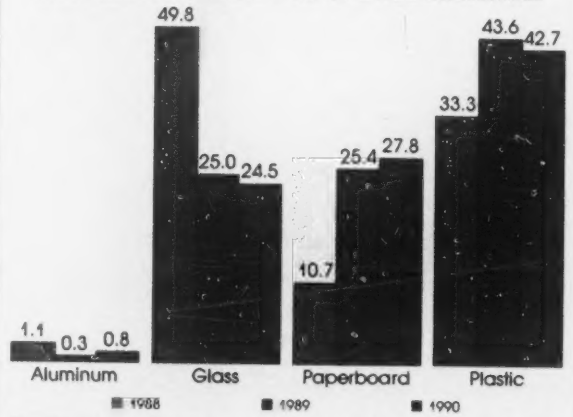
But plastic is not the only packaging material with an apparent perception problem among our respondents.

When asked, "How easy is it to recycle steel?" over 52% of those surveyed answered "difficult/very difficult." That's also up 2% from last year—despite the fact that consumers name metal cans as their favorite package for beef stew, ground coffee and vegetables.

When questioned about aluminum, however, less than 10% of our respondents said they thought the material was difficult or very difficult to recycle. Over 88% said they felt aluminum was "easy/very easy" to recycle.

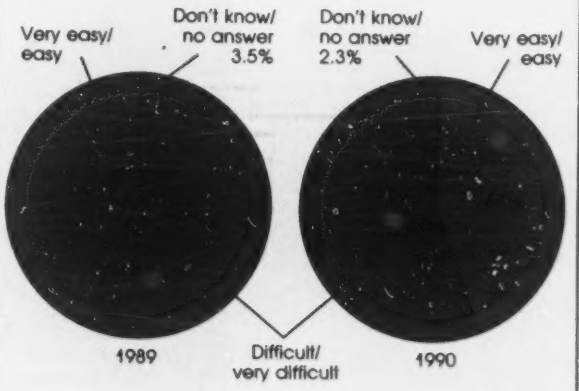
Consumers seem to be telling us that, although they are increasingly aware of the environmental consequences of the products they purchase, they have certain favorite products and packages. These favorites fulfill their needs in one way or another. When a conflict arises, they vote with their dollars. ■

GUILTY PLEASURE: PLASTIC IS CONSUMERS' FAVORITE PACKAGE FOR THE MICROWAVE...



Despite a slight decline over last year, plastic is still shoppers' favorite microwavable package. Paperboard is up slightly, while glass is down.

...BUT RECYCLABILITY REMAINS A CONCERN



Difficulty in recycling plastic is still a concern among our survey respondents. In fact, the perception of pastics' recyclability has declined.

(Editor's note: Our 1990 survey generated a lot of data—more than we could ever present in one feature article. We asked some new questions about the environment and will be reporting consumers' responses in a special news feature in our July issue. Other data will be published as they become relevant.

If you can't wait, or need more detailed information for your own purposes, note that the entire study, consisting of over 225 pages, is available for $500. For more information, contact Consumer Survey Editor, PACKAGING magazine, Cahners Publishing Co., 1350 E. Touhy Ave., Des Plaines, IL 60018, or circle No. **444** on the Reader Service Card.)

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MELISSA LARSON
Senior Editor

"There is no shortage of so-called data on consumer opinions out there. The hard part is sorting the reliable information from the anecdotes and hearsay. There's a right way and a wrong way to poll consumers on their actual buying patterns. We've done it the right way, and we hope it helps."

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